

Take a risk, keep it simple

Good researchers deliver accurate information. Great researchers deliver business insights. The challenge for many research managers is how to be perceived as insightful thinkers who are actively involved in corporate strategy sessions rather than as pure “data heads” who have little more to offer than the basic information their studies kick out.

Let’s suppose you’re a market researcher with at least several years of experience and a track record of delivering pretty good presentations. Chances are you may be reaching that point in your career where you want to be more than just a trusted conduit for research data – you want to have a larger, more strategic role. In short, you want an invitation to sit at the table where the business implications of your team’s research are discussed.

So what’s the best way to get an invitation to the party? Or to revitalize your career and really get noticed? The first place to start is with your presentations themselves – and realize that “pretty good” just isn’t good enough. In my opinion, as someone who has both sat through hundreds of presentations (including many, many painfully boring ones) and given hundreds of presentations to audiences ranging from middle-managers to corporate boards, the best way to get a seat at the decision-making table is to deliver presentations that 1) are engaging and 2) actually provide meaningful, relevant insights to decision makers. In other words, if you want to play at the senior level, you have to give senior-level presentations.

Follow these guidelines to give more effective research presentations

Change perceptions

So how do you craft a senior-level presentation – and get a more favorable response from top management? How do you change organizational perceptions so you’re viewed as something other than a faithful number cruncher?

First, it’s important to understand that data is one thing, but its significance – or what it actually means for the business – is quite another. Many research presentations are simply too long, too academic and/or too conceptual. They are data-intensive when they really need to be insight-intensive.

The purpose of a presentation is not to showcase all your hard

By Gary A. Schmidt

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Keep it simple - and relevant

Robyn Gilson is a director of customer and market insights at WellPoint, an Indianapolis-based health benefits company. For some time she has been working with other staff at the company in trying to improve the way it communicates the significance of its market research data to upper management and other internal audiences. This effort was bolstered recently when she was asked to lead a market research team charged with the responsibility of compiling customer feedback on how well the company is meeting its long-term strategies.

In leading the team, Gilson knew that conventional market research presentation approaches - such as relying on jargon and using presentation slides loaded up with charts and graphs - would not be effective with audiences. Instead, she and her team pursued a very straightforward approach in focusing on the power of simplicity. "We learned that getting our point across in a simple manner is far more powerful than hitting them with reams of data," she says.

In the end, Gilson and her team of researchers came up with a concise, relevant story that succeeded in weaving many pieces of research information together. "This approach has been very meaningful and motivational for the company. It's helped us to clearly see what customers want," she says.

According to Kate Quinn, WellPoint vice president of brand strategy and marketing development, this change is being felt across the organization. "What

we're trying to do now is to create a bridge between what we know from our research and how we talk about it. We began this initiative at the director level and have since implemented it across all levels of our organization," Quinn says.

This initiative has had positive results for both the company overall and its market research staff, Quinn says. "People are being pulled into projects earlier and are involved in strategy sessions more than ever before."

Paul Peterzell is vice president of research and market analysis at the San Francisco offices of the Charles Schwab Corporation, a financial services firm. By learning and applying some key guidelines and principles, Peterzell and his team are now delivering presentations that are more fully valued and that as a result have more significance for the company.

"Probably the most important thing we've done is to look at our presentations from the viewpoint of the client," Peterzell says. "Our initial impulse as presenters is to stand up and present a lot of data and detailed analysis, which shows what a great job we've done. Unfortunately, management doesn't care about lots of information or about how smart we look."

What management cares about is what the information means for the business. "A great way to improve someone's ability to drive the business with a presentation is to get them to think about how others will react - and then act," Peterzell says.

work, or to justify your existence, or to tell the audience everything you know about a particular topic.

Rather, the purpose is to communicate insights that can help make critical business decisions easier (the experiences of two of my clients, WellPoint and Charles Schwab Corporation, which are covered in the sidebar, shed some light on the power of this process). Top management wants to know "What do we do differently next Tuesday as a result of your work?" And that's all they want to know.

If you have a tendency - as we all do - to be enamored of all the wonderful data you brought into this world, the first step toward delivering a presentation that has an impact is to take a machete to your jungle of data. Eliminate everything that isn't perfectly relevant to your core story. By imposing some rigorous self-

detachment, you can begin to learn how to separate the hard-won raw data from the more significant or larger business story it supports.

The fab five

In 25+ years of observing and guiding others in crafting presentations, I've seen great presentations and really bad presentations. There are many aspects that contribute to a compelling, effective presentation. If one adheres to the following "fab five" principles I've devised, you're generally ensured an engaged audience who will embrace your message - and, more importantly, act on it.

1. Keep it tight.

Many research presentations appear to be sold by weight - they can run 75-80 pages or more. In today's business climate, no one has time to sit through 40 pages, let alone 80.

Keep your findings brief and focused on insights. And don't waste time on the nitty-gritty details of methodology or the analytical techniques employed - no one cares. Management trusts you to do good work and just wants to know what you learned.

2. Keep it simple.

The work we do is often very complex but our success depends on our ability to make it appear simple - so the audience can easily follow what we're saying. Sometimes, in attempting to keep a presentation brief, we seem to compete to see who can get the most information on one slide. I've seen eight-point type in a 20x10 matrix and I've seen four graphs, two pie charts and five paragraphs all on one slide. This is a great cure for insomnia but it doesn't sell ideas. Data are not your off-

spring – it’s OK to leave them behind. Remember to tell the audience just what’s important – and resist the urge to tell them every little thing you learned along the way.

3. Focus on the audience’s needs - not yours.

A presentation can serve many purposes. It can help executives make tough decisions, educate audiences about a selected topic or sell an idea, product or service. In all cases, the idea is to engage the audience – it’s all about them. The purpose of a business presentation is not to showcase how incredibly hard you worked or how remarkable your research models are, nor is it to demonstrate your formidable command of presentation software. You just need to explain what the findings mean for the business.

4. Be engaged - and engaging.

You don’t have the right to be boring! A researcher I know once said, “How excited can we get about this? It’s only research.” Yikes! If we want others to take us seriously and become engaged in the value we can bring to strategic discussions, we need to be engaged ourselves. Excitement and enthusiasm are contagious. Our presentations need to tell a great story, not read like a dictionary. Again, explain what the findings mean for the business. That’s exciting to business decision makers.

5. Take a risk.

In our efforts to be consummate

professionals, many of us are almost fanatic about presenting absolutely accurate information. Consequently, we sometimes resist drawing conclusions on anything outside the specific scope of our study findings. The fact is that executives make calculated guesses based on imperfect information all day, every day. If we can’t join them in embracing uncertainty and taking an informed risk, we won’t be invited to the table when the big strategic decisions are made. Run with the big dogs – take a risk, answer the questions, and explain what the findings mean for the business. If it walks like a duck, quacks like a duck and swims like a duck, go out on a limb and call it a duck. Then explain what it means for the business.

Rarely tell you

If your presentations are characterized by careful tables of data, really densely packed slides, ripe with all kinds of great information and impressive discussions of methodology, chances are your audience is bored to tears – but they’ll rarely tell you. With presentations, as with life in general, most people tend to keep their toughest responses bottled up inside because they don’t want to hurt anyone’s feelings – especially if they see you as a sincere, well-intentioned data geek.

In a recent conversation with the president of a Fortune 250 company, he asked me to pass along a message for him – something I’ve heard all too many times and that I

affectionately refer to as “The Five Things Top Management Wants To Tell Research – But Just Can’t.”

1. “You’re boring us to tears.”

2. “Enough with all the numbers already – what do we do?!”

3. “I don’t have all day to listen to you – how about 10 pages next time instead of 50?”

4. “I don’t care what fancy methodology you used – what’s the bottom line?”

5. “Take a position, will you? I don’t want to hear about ‘confidence levels’ or ‘statistical significance’!”

Want to avoid these career-limiting reactions to your presentations? Want to look at engaged, interested faces instead of the unfocused stares of people about to slip into unconsciousness? Then, once again, present clear, concise, simple insights instead of data findings.

Different light

Insights don’t require dense charts and tables with eight-point type – they do require clear, concise, simple information for people who don’t care about research details but do care very much about the business implications of your work. Want a seat at the table where the decision-making happens? Give your organization’s decision makers the business implications of your research and why it should matter to them – in 15 pages or less – and before you know it, you’ll be viewed in a different light. You’ll be a regular at the strategy table. | Q